

**EMPLOYER QUESTIONNAIRE
DISCREPANCY BETWEEN IRS AND SSA RECORDS**

IRS records show that, for the year below, you paid Social Security and/or Medicare taxes on more employee wages than SSA processed. The SSA processed wage amount is based on your Forms W-2 and W-3 reports. The total wages on your Forms W-2 and W-3 for a year should equal the sum of the amounts that you report quarterly to IRS on your Forms 941, 943, 944 or on Schedule H.

IRS/SSA Data for Tax Year: YYYY

EIN: 99-9999999

Employer Name: Employer Name

| | Soc. Security Wages | Medicare Wages/Tips |
|---|----------------------------|----------------------------|
| Amount Reported on W-3: | \$999,999.00 | \$999,999.00 |
| Amount Processed by IRS: | \$999,999.00 | \$999,999.00 |
| Amount Processed by SSA: (from Forms W-2) | \$999,999.00 | \$999,999.00 |
| Difference Between IRS and SSA Processed Amounts: | \$999,999.00 | \$999,999.00 |

| | Soc. Security Tip Totals |
|---|---------------------------------|
| Amount Reported on W-3: | \$999,999.00 |
| Amount Processed by IRS: | \$999,999.00 |
| Amount Processed by SSA: (from Forms W-2) | \$999,999.00 |
| Difference Between IRS and SSA Processed Amounts: | \$999,999.00 |

CHECK AND COMPLETE

Check and complete any items that apply to your wage report for the tax year shown above.

1. I did not file Forms W-2 with SSA. I am now taking the following action (check one):
- Enclosing the original Copy A of Forms W-2 and W-3, or a magnetic media report or
 - Sending SSA an electronic file.

SSA-97-SM (11-06)

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- 2. I filed Forms W-2 under the EIN shown above. I am now taking the following action for the wages I previously reported (check one):
 - Enclosing legible copies of Forms W-2 and W-3, or ~~a magnetic media report, or~~
 - Sending SSA an electronic file.
- 3. The Form W-2 amounts I reported earlier are incorrect. (Enclose Copy "A" of correction Forms W-3C/W-2C and attach legible copies of the corrected tax report if filed with IRS.)
- 4. The Form W-2 amounts I reported earlier are correct. I incorrectly reported wage totals to IRS. (Attach legible copies of the corrected tax report filed with IRS.)
- 5. The difference is due to sick pay from a third party. (Attach an explanation that shows the name and EIN of the third party and the dollar amounts involved.)
- 6. I cannot explain the difference between SSA and IRS records. (Attach legible copies of Forms W-2 and W-3 and the tax reports filed with IRS.)
- 7. I reported the same correct wage amounts to IRS that I reported to SSA. However, the IRS amounts shown above are incorrect. (Attach legible copies of the tax reports filed with IRS.)
- 8. Other _____

Your Name and Title _____
Daytime Phone, with area code

INFORMATION ABOUT THE DATA YOU SEND SSA

The name, Social Security number and wage amounts on the Forms W-2 must be readable and complete. If we cannot read all information on the documents you submit, or if any of these items are missing, we cannot add the wages to the employee's wage record. If you need blank copies of the Forms W-2 or W-3, call IRS at 1-800-829-3676. If your copies of the Forms W-2 are illegible, please prepare duplicates on blank copies of the Forms W-2. Make sure the Forms W-2 show the year for which the wages are being reported.

Note: If you send 250 or more wage items to us, you must ~~use magnetic media or~~ file your wage reports electronically in accordance with ~~SSA's Magnetic Media Reporting and Electronic Filing (MMREF) publication~~ **Publication 42-007: Specifications for Filing Forms W-2 Electronically (EFW2)**. To get more information, go to our website at www.socialsecurity.gov/employer or call SSA's Employer Reporting Branch at 1-800-772-6270 from 7:00 A.M. to 7:00 P.M., Eastern time, Monday through Friday.

RETURN THIS QUESTIONNAIRE

Please send all requested information to:

Social Security Administration, Metro West
P.O. Box 33021
Baltimore, Maryland 21290-3021

Do not send cash, checks or money orders to SSA. Tax payments are payable to the Internal Revenue Service.